DRAFT CHARTER

TEAM NAME-

CUSTOMER RELATIONSHIP MANAGEMENT
FOCUS–CALL CENTER

SHARED AND MEANINGFUL PURPOSE-

PURPOSE-
- Improve customer satisfaction
- Reduce unit costs
- Better customer relationship management in a timely way through the medium that best meets their needs, i.e. phone, web, paper
- Promoting electronic business while maintaining easy access to paper

WHY NOW?-
The PBO Performance Objectives and the Customer Service Task Force Report both make a strong request for a single number for all student calls by September, 2000.

This initiative has the greatest potential to affect the PBO goals, enterprise-wide.

GUIDING PRINCIPLES FOR THE YEAR 2000-
- Remain customer focused, not process focused
- Best in business
- Reliable and consistent
- Worthy of trust
- Implement Quick Hits
- Providing immediate customer beneficial impact

SPECIFIC AND CHALLENGING GOALS -	
TOPIC	**GOALS**
Quick Hits	• Agreed upon prioritized list of quick hits and a high level business case for each • Implementation of quick hits • Evaluation Plan
Documentation of Current State of Customer Relationship Management	• An inventory of all SFA sites, focusing on the Call Center activities and other related business processes (such as, web services and manual processing), as appropriate, including– 　• Location 　• Services provided 　• Volumes 　• Staffing level 　• Top 20 questions asked 　• Information technology 　• Who is the customer 　• Reporting–kinds of reports they provide 　• Available quality measures, standards, and procedures
Best in Business	• Survey of Best in Business • Gap analysis between Best in Business and Current State
Solution for the future	• A list of recommended solutions and a business case for each • Management Council agreement on solutions that will be implemented
Action Plan	• Action Plan for additional Quick Hits • Action Plan for detailed design and implementation of agreed upon solution
SPECIAL CONDITIONS, CONSTRAINTS, OR REQUIREMENTS - 　*Note: check with sponsor*	

CLEAR ROLES -	
Sponsor	• Jeanne VanVlandren
Team Leader	• Dena Bates
Key decision-makers	• SFA Management Council
Core Team Members	• Barry Morrow – Financial Partners Channel • Sandy Busse – DL Repayment • Corwin Jennings – DL Consolidation • Denise Hill – CIO • Shirley Wheeler – Debt Collection • Karl Augenstein – Modernization Partner • Karen Sefton – Schools Channel • Michaelyn Milidantri – Schools Channel • Sherlene McIntosh – Application Processing • Yvonne Somerville – Application Processing • Intern – Customer Representative
Technical/Operations Representatives	• NCS – Scott Reynolds • EDS – Don Applegarth/Barbara Anderson • AFSA – Sue Szabo • Raytheon – ? • Modernization Partner – ?
Advisory Members	• Representative from a specialized "help desk" • Representative from CFO (Paul Stonner?) • Karen Santos-Freeman – Director of Communications • Candice Hardesty – Director of Contracting & Acquisitions • Human Resources Designee • Candy Kane – Acting as Director of Analysis • Anne Teresa – Acting Director of SFA University
Recorder/Documenter	•
Facilitator	• Nancy Brodsky • Julia Santiago

DECISION-MAKING-	•
• Preferred approach – team consensus on recommendations	
• Fall-back approach – team leader and/or business owner where consensus cannot be achieved	
• Recommendations from the Core Team to the sponsor as the final decisionmaker	

A COMMON AND COLLABORATIVE APPROACH-

AN AGREED UPON PROCESS MAP AND WORK PLAN-

See attached process map

OPERATING AGREEMENTS AND PRINCIPLES - how we want to work together-

- Communicate – information to eachother
- Stick to timelines
- Consistent meeting time
- When given assignments – complete by due date
- Show up on-time
- Start and end on-time
- Distribute documents in advance
- Read documents in advance
- Resolve to deal with Core Team issues – resolve them, don't let them fester
- Mindful that all opinions are desired, respected, and considered
- When not able to attend a meeting, let the Team Leader know
- Make sure Core Team members receive all meeting materials when unable to attend

HOW OFTEN THE CORE TEAM WILL MEET AND OTHER KEY AGREEMENTS -

Once per week – Tuesdays 10 – 12

COMPLEMENTARY SKILLS AND RESOURCES -

KEY STAKEHOLDERS AND THEIR INTERESTS AND NEEDS -

   REFER TO BELOW

COMPETENCY REQUIREMENTS FOR THE TEAM-

   TBD during the sub-team assembly phase.

RESOURCE REQUIREMENTS - –(time, people, money, materials)

- Quick hits will likely require funding
- Budget dollars have been approved

OTHER

STAKEHOLDER ANALYSIS -

STAKEHOLDERS	INTERESTS/NEEDS/WINS
• Applicants–including parents	• Worthy of trust–consistency • Timely information • Simplified forms–easy forms to fill account • Shorter wait times–quick response
• Big ED	• External (Congressional) impact on decisions • Analysis and Forecasting
• Borrowers (focus group(s) – TBD)	• Privacy • Real-time access to their information–24/7 • Accurate information • Advice on options • Consistency in responses/answers • One call does it all • Problem resolution • Worthy of trust–consistency
• CFO	• Funding issues
• CIO	• Be a part of technology solutions • Solutions fit within overall standards
• Congress	• Legislative impact • Not remove their Call Centers or give me one • Good service • Having their buy-in • Cost reduction
• Financial Partners–Lenders and GA's	• Quick access to financial information • Same as Schools • Shelter their loan information • Unfettered access to our direct loan portfolio
• Management Council	• Improved customer satisfaction • Reduced unit costs • Tangible benefits • Quick success
• OGC	• Compliance with current laws and regulations

• OIG	• Unfettered access to data • Compliance with laws and regulations • Relevance in assisting us in our mission
• Schools (focus group(s) – TBD)	• Simplified access to student and school information • Access to same information that CSR's give out over phone • Unique support apparatus−(not necessarily for students) • Worthy of trust−consistency
• Staff from SFA	• Job relevance • Their involvement in solutions • Tools to better perform jobs • Access to information